

# INFORMATION TECHNOLOGY PROFESSIONALS PERFORMANCE MANAGEMENT AND COMPETENCY RATING FORM

## STANDARDS AND INSTRUCTIONS

- A. This form is used in accordance with Civil Service Commission Rule 2-3 and Department of Civil Service Regulation 2.06 to document performance factors and objectives, required competencies, and the supervisor's evaluation of the employee's performance for: (1) probationary ratings, (2) progress reviews, and (3) annual ratings. This form is only used for Information Technology Professionals.
- B. A probationary period is required upon: (1) hire, (2) promotion, and (3) lateral job change between departments to a different classification. A probationary period is not required, but may be established for a reinstatement or demotion.
- C. A full-time probationary employee shall be rated upon completion of six months and twelve months of service. Less than full-time probationary employees shall be rated upon completion of nine months and eighteen months of service. New hires without status shall also be rated upon completion of three months of employment.
- D. The supervisor or supervisor and employee must establish performance factors or objectives setting forth expectations for the rating period. Performance objectives should be briefly stated but specifically defined and should include expected outcomes. All relevant competencies must also be identified. Competencies measure behaviors or how the employee accomplishes the objectives. To obtain the competency rating scales associated with the twelve competencies defined on pages 3 and 4 of this form, see Civil Service Web site <http://www.michigan.gov/mdcs/1,1607,7-147--22736--,00.html#CS1744>.
- E. At the beginning of each rating period, the supervisor must review the performance factors, objectives, and competencies with the employee and explain that they set the performance expectations for the rating period. The employee and supervisor shall sign and date the form, and each shall retain a copy.
- F. The supervisor should provide regular performance feedback to the employee. Formal progress reviews may be given during the course of the annual review period.
- G. At the end of the review period, the supervisor shall evaluate the employee's performance and assign an overall rating. The employee's achievements in relation to the performance factors (what was accomplished) and the competency evaluation (how the objectives were accomplished) must be considered in determining the employee's rating. The supervisor's evaluation must be documented on the form. The supervisor must discuss the evaluation with the employee.
- H. **The probationary rating categories are "Unsatisfactory," "Meets Expectations," and "High Performing."** Meets Expectations and High Performing are satisfactory ratings. An Unsatisfactory probationary rating is discipline and may be the basis for additional discipline, up to and including dismissal.
- I. **The annual rating categories are "Needs Improvement," "Meets Expectations," and "High Performing."** A Needs Improvement rating is not discipline. If a Needs Improvement rating is issued, the appointing authority shall establish a plan for improving the employee's performance or behavior.
- J. All ratings must be completed within twenty-eight calendar days of the end of the rating period.
- K. The supervisor and employee must sign and date the rating as evidence of the review. The appointing authority must sign and date Unsatisfactory probationary ratings and Needs Improvement annual ratings.
- L. The appointing authority must notify the State Personnel Director of any Unsatisfactory ratings within twenty-eight calendar days of the rating.
- M. Training on performance management is available from the Department of Civil Service. See Web site [www.state.mi.us/mdcs/training/calendar/index.htm](http://www.state.mi.us/mdcs/training/calendar/index.htm) for details.

State of Michigan  
Department of Civil Service  
**Bureau of Human Resource Services**  
P.O. Box 30002, Lansing, MI 48909

**INFORMATION TECHNOLOGY PROFESSIONALS**  
**PERFORMANCE MANAGEMENT AND COMPETENCY RATING FORM**  
FOR PROBATIONARY RATINGS, PROGRESS REVIEWS, AND ANNUAL RATINGS

Information and instructions for conducting probationary and annual reviews and evaluations are found in Civil Service Regulation 2.06, available from all human resource offices and the Department of Civil Service Web site, at [www.michigan.gov/mdcs](http://www.michigan.gov/mdcs).

Name	Employee I.D. No.	Position Code
Classification	Department/Agency/Bureau/Division	
Supervisor's Name	Supervisor I.D. No.	Rating Period Start/End Dates From: To:

**REVIEW OF PERFORMANCE FACTORS AND COMPETENCIES**

I certify that I have reviewed the performance factors and competencies identified on this form and received a copy.

I certify that the performance factors and competencies identified on this form provide the basis for evaluating this employee's performance during this rating period.

\_\_\_\_\_  
Employee's Signature and Date

\_\_\_\_\_  
Supervisor's Signature and Date

**PROBATIONARY RATING**

☐ 3 MONTH (NEW HIRE)  
☐ 12 MONTH

☐ 6 MONTH  
☐ 18 MONTH (PART-TIME)

☐ 9 MONTH (PART-TIME)  
☐ OTHER \_\_\_\_\_

**RATING:** ☐ Unsatisfactory

☐ Meets Expectations

☐ High Performing

**PROGRESS REVIEW**

I certify that I have had a progress review and discussed my performance with my supervisor. My signature reflects only that a meeting occurred.

\_\_\_\_\_  
Employee's Signature and Date

I certify that the employee's progress has been reviewed with the employee.

\_\_\_\_\_  
Supervisor's Signature and Date

**ANNUAL RATING**

**RATING:** ☐ Needs Improvement

☐ Meets Expectations

☐ High Performing

I certify that I have had the opportunity to review this rating and understand that I am to receive a copy of it. I understand that my signature does not necessarily mean that I agree with the rating.

\_\_\_\_\_  
Employee's Signature and Date

I certify that this rating report constitutes my evaluation of the performance of this employee for the period covered.

\_\_\_\_\_  
Supervisor's Signature and Date

I certify that I have reviewed this evaluation and concur with the rating given. (Required only if rating is Needs Improvement or Unsatisfactory.)

\_\_\_\_\_  
Appointing Authority's Signature and Date

Name	Rating Period
	From: To:

<p align="center"><b>PERFORMANCE OBJECTIVES AND EVALUATION</b></p> <p>List the performance factors/objectives and accomplishments expected during the rating period. Revise and add factors/objectives, as necessary, throughout the rating period. Upon completion of the rating period, summarize the employee's accomplishments and performance.</p>
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Performance Factors/Objectives	Evaluation

Name	Rating Period From: _____ To: _____
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## INFORMATION TECHNOLOGY COMPETENCIES

Competencies are defined as the ability, skill, knowledge, and motivation needed for success on the job. The Information Technology competency rating scales should be used to communicate expectations, determine competency ratings, provide feedback on performance, and identify areas for professional development and can be found at <http://www.michigan.gov/mdcs/1,1607,7-147--22736--,00.html#CS1744>.

### RATING CATEGORIES

Probationary: US — Unsatisfactory	ME — Meets Expectations (Satisfactory)	HP — High Performing (Satisfactory)
Annual: NI — Needs Improvement	ME — Meets Expectations	HP — High Performing

CHECK ALL THAT APPLY	CORE COMPETENCIES (Check and Evaluate All Relevant Competencies)	RATING
<b>TECHNICAL</b>		
<input type="checkbox"/>	<b>Technical Expertise</b> — Has deep expertise in all elements of the position. Possesses knowledge of leading-edge concepts as required by job responsibilities. Applies comprehensive understanding of IT processes in executing job duties.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>
<b>PROFESSIONAL</b>		
<input type="checkbox"/>	<b>Integrity</b> — Earns trust and respect by behaving fairly, ethically, and responsibly.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>
<input type="checkbox"/>	<b>Initiative</b> — Makes active attempts to influence events to achieve goals and objectives; goes beyond what is required. Takes responsibility for getting things done.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>
<input type="checkbox"/>	<b>Resiliency/Persistence</b> — Able to “bounce back” from problems, pressures, stress, and difficulties. Continues to work toward the achievement of a goal or solution of a problem even in the face of obstacles.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>
<b>INTERPERSONAL</b>		
<input type="checkbox"/>	<b>Communication</b> — The ability to communicate well, both orally and in writing, with a variety of people across different situations. Includes both oral and written communication, as well as the ability to communicate with a variety of personalities. Hears and accurately interprets information.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>
<input type="checkbox"/>	<b>Customer Service</b> — Works with customers (both internal and external) and maintains a focus on providing quality service. Seeks customer impact in decisions.  <u>Comments:</u>	<div style="border: 1px solid black; width: 80px; height: 40px; margin: 0 auto;"></div>

Name	Rating Period	
	From:	To:

<input type="checkbox"/>	<b>Teamwork</b> — Collaborates with others; does what is necessary to complete the priorities of the day. <u>Comments:</u>	<input type="text"/>
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ANALYTICAL		
<input type="checkbox"/>	<b>Analysis</b> — Uses relevant information to diagnose problems, identify key issues, relationships, and root causes from a variety of quantitative and qualitative data. <u>Comments:</u>	<input type="text"/>
<input type="checkbox"/>	<b>Decision-Making</b> — Makes appropriate decisions (both difficult and “routine”) and accepts responsibility for consequences. Timing of decision-making is well balanced – neither rushed nor evidencing procrastination. <u>Comments:</u>	<input type="text"/>
<input type="checkbox"/>	<b>Problem Solving</b> — Combines information and ideas in novel ways to produce solutions. <u>Comments:</u>	<input type="text"/>

PLANNING		
<input type="checkbox"/>	<b>Handling Multiple Tasks</b> — Ability to work several tasks or activities simultaneously. Works autonomously to plan and organize activities and manage one’s own time in order to complete necessary tasks. <u>Comments:</u>	<input type="text"/>
<input type="checkbox"/>	<b>Project Planning and Management</b> — Defines objectives, develops plans, and implements plans in order to achieve needed business results. <u>Comments:</u>	<input type="text"/>

MANAGERIAL		
<input type="checkbox"/>	<b>Developing Staff</b> — Maintains an awareness of capabilities and works with employees to facilitate their growth and understanding. Provides timely, actionable, and constructive performance feedback. Reinforces strengths through positive feedback and recognition. <u>Comments:</u>	<input type="text"/>
<input type="checkbox"/>	<b>Leading Staff</b> — Influences and directs the activities of individuals and groups, such that a higher level of performance is achieved. <u>Comments:</u>	<input type="text"/>
<input type="checkbox"/>	<b>Understanding Business Drivers</b> — Understands the business and its objectives, and applies this understanding to IT objectives. Looks for ways to improve business operations. <u>Comments:</u>	<input type="text"/>